

SMS Patient Appointment Management

We're introducing a new way to help your practice reduce no-shows and keep patients engaged, **SMS Patient Appointment Management**.

With this new feature, patients can confirm, cancel, or reschedule their appointments directly through text message, helping your staff save time and keep their schedule up to date.

Each reminder also includes key details about patients' upcoming appointments, such as the date, time, and location, making it simple for them to review and act right from their phone.

Note: SMS notifications are available only to patients at this time. Caregivers do not receive SMS messages.

Note: If a patient's preferred language is set to Spanish, all appointment reminder messages and responses will be sent in Spanish.

How patients opt in or out of SMS notifications

Patients can manage their text message preferences from their **My Account** page in the patient portal.

Under **Enable SMS Notifications**, patients can choose from existing phone numbers listed in the **Demographics** tab of their iKnowMed chart or manually enter a mobile number of their choice (callout 1). Then they can toggle the switch to turn on **SMS notifications** (callout 2) and **Appointment Reminders** (callout 3).

My Account

Personal Information
View demographics and contact information

Account Settings
Manage Ontada Health account settings

Caregivers
Manage caregivers that have access to your account

Notifications Settings
Manage email & SMS notifications

Activity Log
View logs of transactions within your medical records

3rd Party Applications
Manage access to your health information by 3rd party applications

SMS Notification Settings

Enable SMS Notifications: 921-921-9210 (Mobile) **1** On **2**

To update the phone number, switch Enable SMS Notifications to Off, change the phone number, then switch Enable SMS Notifications to On. You will then receive a new SMS invitation to the new phone number.

Appointment Reminders On **3**

Documents On

Form Reminders On

Forms - Completed On

Forms - New On

Messages On

Results On

After opting in, they'll receive an initial text message asking them to reply with **START** to begin receiving appointment-related messages.



If a patient needs to resend the opt-in invitation, they can click **Resend Invite** on their **My Account** page (callout 4). The invitation text message will be sent again automatically.

4 You are not receiving SMS notifications yet!
An SMS invitation has been sent to 212-121-2121. Please reply via SMS to fully opt into SMS notifications.
You can disable your individual notification types once you have fully opted in.
Not seeing a text? [Resend invite](#) (Last message sent 09/09/2025 5:35pm IST)

Enable SMS Notifications: 212-121-2121 (mobile) On Pending

To update the phone number, switch Enable SMS Notifications to Off, change the phone number, then switch Enable SMS Notifications to On. You will then receive a new SMS invitation to the new phone number.

Appointment Reminders	Inactive <input type="checkbox"/>
Documents	Inactive <input type="checkbox"/>
Form Reminders	Inactive <input type="checkbox"/>
Forms - Completed	Inactive <input type="checkbox"/>
Forms - New	Inactive <input type="checkbox"/>
Messages	Inactive <input type="checkbox"/>
Results	Inactive <input type="checkbox"/>

Patients can also update the phone number used for reminders or turn text messaging off at any time. To stop receiving SMS reminders, patients can reply **STOP** to any text message. They can opt back in later by replying **START** via text or updating preferences in the patient portal.

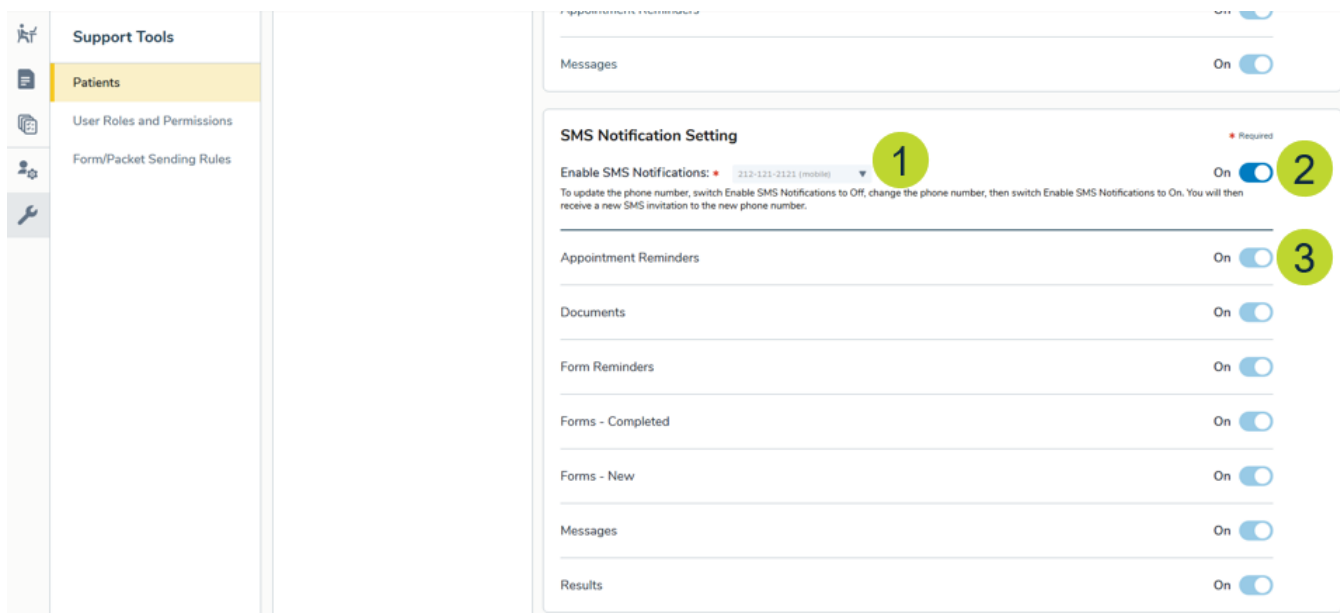


How practices opt patients in or out of SMS reminders

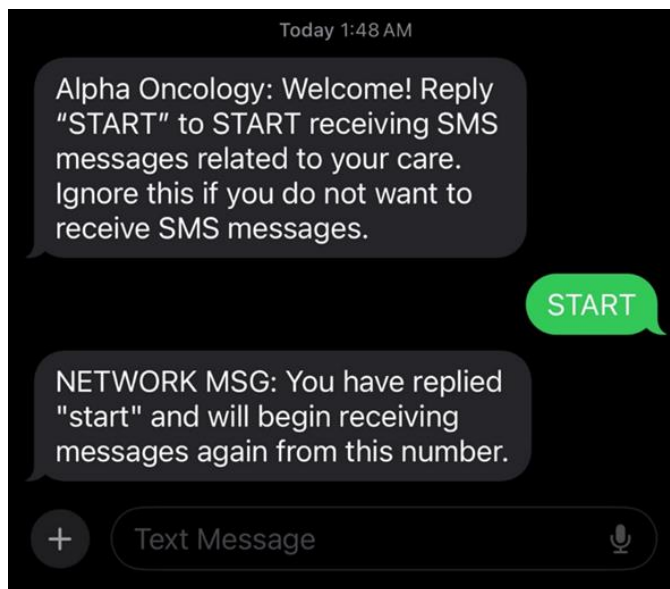
Practices can help patients get started with SMS reminders from **Support Tools > Patients**.

By default, patients must manually opt in to text messaging. However, **Ontada Health offers an optional setting** that allows practices to automatically opt in all patients for text messaging. To enable automatic patient opt-in, contact your **Ontada Health Account Manager**.

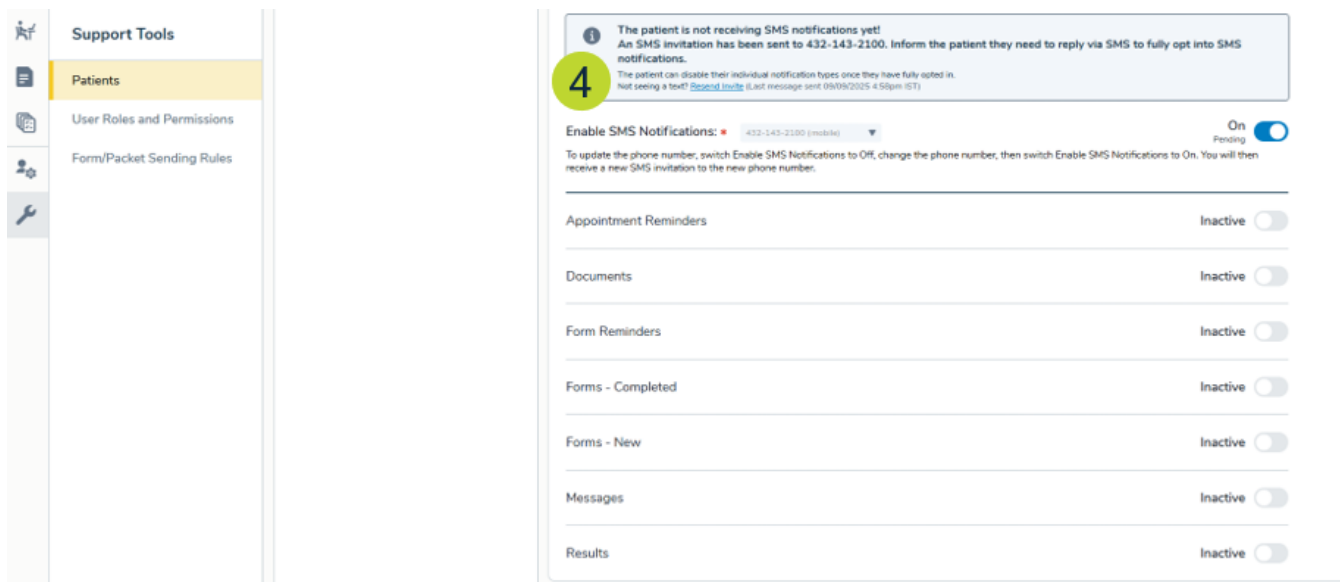
To enable SMS notifications for a patient, go to **Support Tools > Patients** and choose a patient. Under **SMS Notification Settings**, choose from existing phone numbers shared from the patient's **Demographics** tab (callout 1). Toggle the switches to turn on SMS notifications (callout 2) and **Appointment Reminders** (callout 3).



The patient will receive an initial text message prompting them to reply **START** to confirm participation.



If your practice needs to resend the opt-in invitation, click **Resend Invite** on under **SMS Notification Settings** (callout 4) and the invitation text message will be sent again automatically.

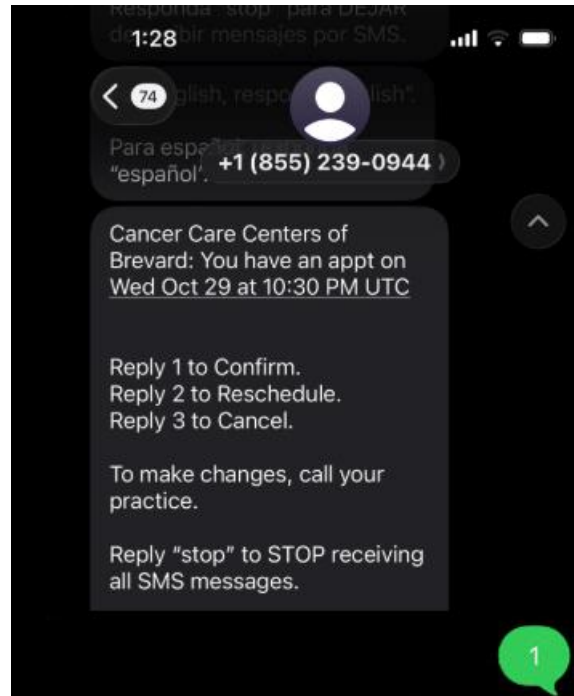


Practices can also update the phone number used for reminders or turn text messaging off at any time in this area. If a patient opts out by replying **STOP**, they can opt back in via text or through the patient portal, or the practice can re-enable text messaging on their behalf.



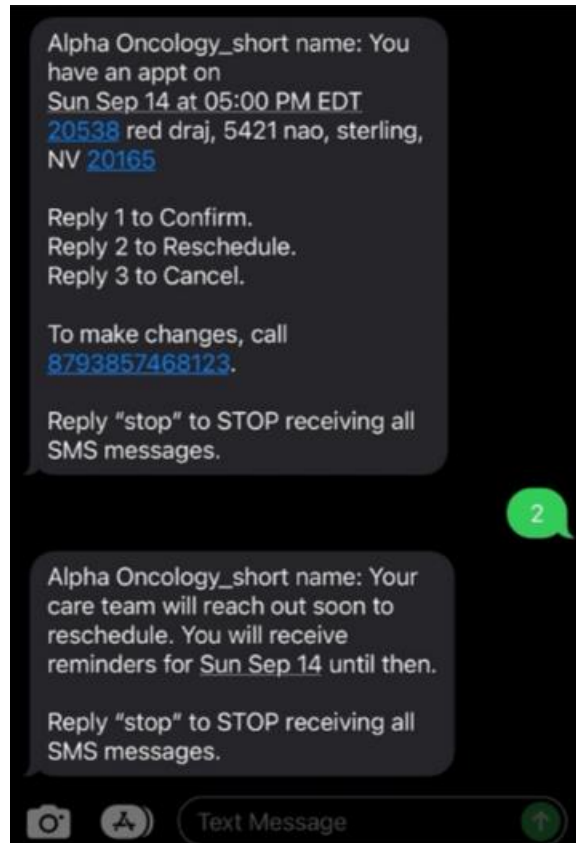
Appointment confirmation via SMS

Patients who receive an SMS reminder can simply reply with '1' to **confirm**. Once confirmed, the confirmation is automatically documented in the Appointment Response Report. No staff action is required.



Appointment reschedules via SMS

If a patient cannot make an appointment, they can reply to the SMS reminder with '2' to **reschedule**.



A rescheduling task is created in the **General Queue** so your staff can be alerted that they must contact the patient to arrange a new appointment.

Ontada Health

General Queue

General Queue Last refreshed 09/11/25 at 10:29:02 AM CREATE TASKS

Patient: Q new, test (DOB: 10/10/2000 / M / MRN: tjmsms) Filter Preset: None SAVE NEW

Date Created: All Location: All Priority: All Provider: All Task Purpose/Sub-purpose: All Assignee: All User Group: All

Status: All Flag: All Source: All CLEAR FILTERS

OPEN TASKS CLOSED TASKS

Flag	Status	Patient Name	Priority	Task Purpose	Sub-purpose	Source	Task Preview	Location	Provider	Assignee	User Group
○	NEW	new, test	M	Reschedule Appointment		Portal	Current Appt: 09/...	Fremont	test phy	Unassigned	Unassigned
○	NEW	new, test	M	Reschedule Appointment		Portal	Current Appt: 09/...	Central Region-B...	test phy	Unassigned	Unassigned
○	NEW	new, test	M	Reschedule Appointment		Portal	Current Appt: 09/...	Central Region-B...	test phy	Unassigned	Unassigned

3 results

In the patient portal, the affected appointment is highlighted in **red** and marked as **pending** with the message: *Your request to reschedule your appointment has been sent. Someone from the office will contact you soon.* Once the task is completed, the pending status is automatically cleared.

Upcoming Appointments

[NEW APPOINTMENT](#)

September 18, 2025 (Thursday)

Alpha Shawn Test 2209 KINGSTON DR | Alpha Oncology | 1 Session | 1 Pending Reschedule [^](#)

[REQUEST CANCEL](#) [REQUEST RESCHEDULE](#)

! Your request to reschedule your appointment has been sent, someone from the office will contact you soon.

2:30 AM IST
Jones, DrSonjia
Reschedule Pending

To Do List

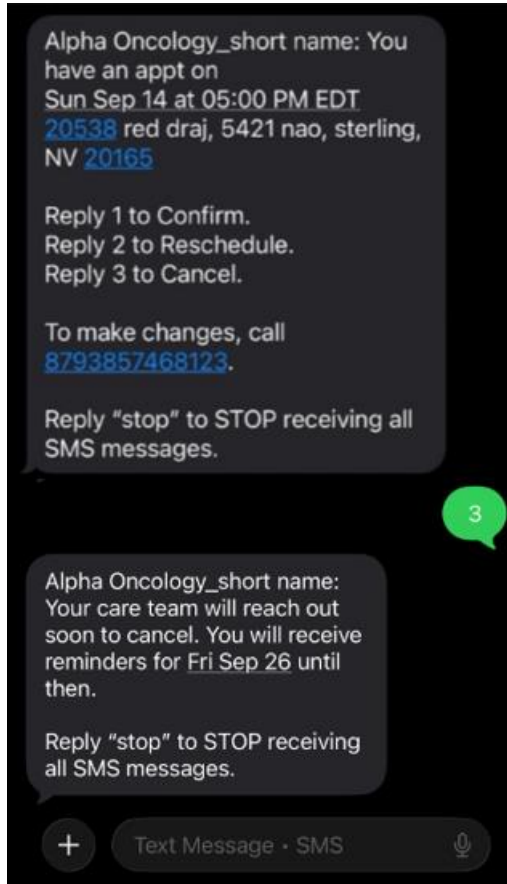
- Lifestyle and Work
- Medications and Allergies
- Past Medical History

Direction

Alpha Oncology - Alpha Shawn Test
2209 KINGSTON DR
LAWRENCE, KS 66049
[Open in Google Maps](#)

Appointment cancellation via SMS

If a patient cannot make an appointment, they can also reply to the SMS reminder with '3' to **cancel**.



A cancellation task is created in the **General Queue** so your staff can be alerted that they must cancel the appointment.

General Queue Last refreshed 09/12/25 at 06:02:22 PM CREATE TASKS

Patient Filter Preset: SAVE NEW

This display is filtered

Date Created:
 Location:
 Priority:
 Provider:
 Task Purpose/Sub-purpose:
 Assignee:
 User Group:

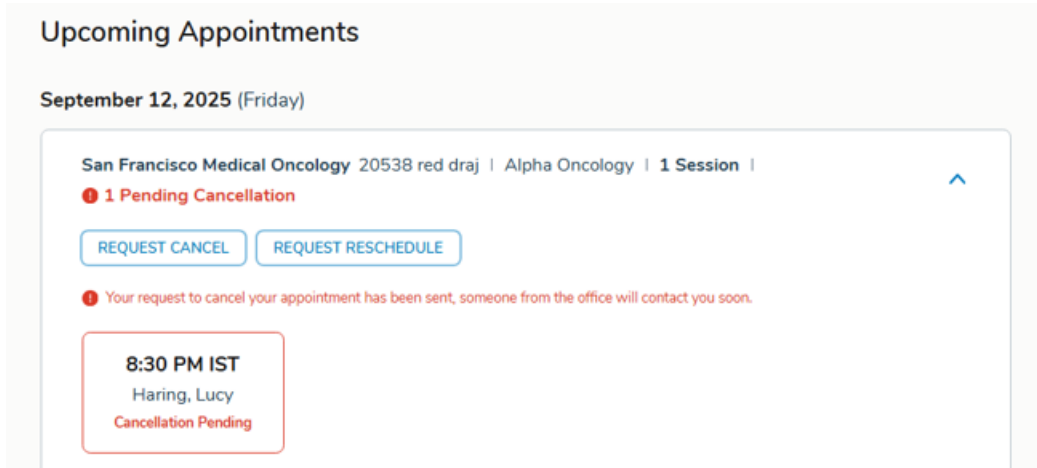
Status:
 Flag:
 Source:
CLEAR FILTERS

OPEN TASKS
 CLOSED TASKS

Flag	Status	Patient Name	Priority	Task Purpose	Sub-purpose	Source	Task Preview	Location	Provider	Assignee	User Group
○	NEW	new, test	M	Cancel Appointment		Portal	Current Appt: 09/...	San Francisco Me...	test phy	Unassigned	Unassigned
○	NEW	new, test	M	Reschedule Appointment		Portal	Current Appt: 09/...	Alpha Shawn Test	test phy	Unassigned	Unassigned

2 results

In the patient portal, the affected appointment is highlighted in **red** and marked as **pending** with the message: *Your request to cancel your appointment has been sent. Someone from the office will contact you soon.* Once the task is completed, the pending status is automatically cleared.



Track SMS engagement with reports

Two new reports in **iKnowMed > Admin > Reports** can help your practice monitor patient engagement with and message delivery of SMS reminders:

- Appointment Response Report:** See how patients respond to SMS reminders (Confirmed, Canceled, Reschedule Requested, or No Response) by practice location.

Appointment Response Report

Appt Date: Region: Scheduling Location: Appt Provider/Resource: Patient Response:

Appt Date/Time	Region	Scheduling Location	Appt Provider/Resource	Patient MRN	Patient Name	Phone Attempted	Patient Response
09/28/2025 06:45 AM CDT	Checkregiontest1	San francisco medical oncology	Lucy Haring, Product Owner	Reporttwo	Two, Report	N/A	N/A - Missing Phone
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	APL28x465	29717, 75982	(297) 923-9919	N/A - Notification Failed
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	APSL83735	28660, 18717	(654) 519-0881	N/A - Notification Failed
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	AP9p15918	86301, 13243	(710) 582-0481	N/A - Notification Failed
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	AP5L2x495	98081, 18596	(272) 689-3357	N/A - Notification Not Delivered
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	AP490y944	29078, 19283	(118) 898-0610	N/A - Notification Failed
09/28/2025 09:30 AM CDT	N/A	Fremont	Seth Fillmore, MD	AP8ID2370	40507, 23995	(581) 595-2167	N/A - Notification Not Delivered

- Appointment Response Rate Report:** Track delivery rates and opt-in/opt-out activity for appointment reminders across locations.

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Appointment Response Rate Report

Appt Date (From): Appt Date (To): Include Inactive Region:
Include Inactive Location: Region: Scheduling Location:

Region	Scheduling Location	# Appts	# Patients Opted In	# Patients Opted Out	# Missing Phone	# Notifications Delivered	# Notifications Not Delivered	# Notifications Failed	# Confirmat
N/A	Central region-boulder cl...	12026	2	3	12021	0	0	1	0
San francisc...	N/A	6	2	1	3	0	1	1	0
N/A	Fremont	5	5	0	0	1	0	1	0
N/A	Alpha shawn test	3	1	2	0	1	0	1	1
N/A	Homira	1	0	1	0	0	0	0	0